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# Introduction to Citation Management

October 2, 2022

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Data and Research Engagement Librarian, Assistant Professor

OHSU Library

# Housekeeping!

**Questions welcome  
anytime - type them in  
the chat**

**Get ready to answer  
poll questions -  
[pollev.com/mwhite387](https://pollev.com/mwhite387)**

By the end of  
this session, you  
will be able to...

## Benefits

- Summarize the basic features and usefulness of reference managers

## Record

- Use a reference manager to collect article citations and full text

## Organize

- Implement an organization strategy

## Cite

- Use a reference manager to insert citations and create a bibliography

## Support

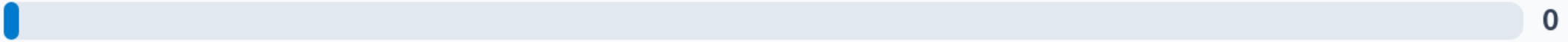
- Identify where to go for help and technical support

## Register

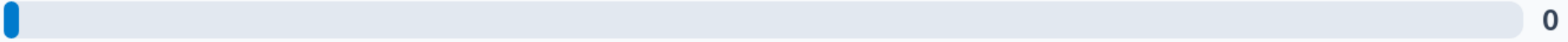
- Sign up for hands-on workshops

## Why use a reference manager?

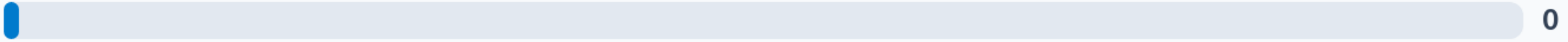
Collect, organize, and share bibliographic references



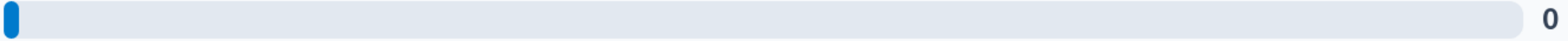
Collect, organize and share web bookmarks



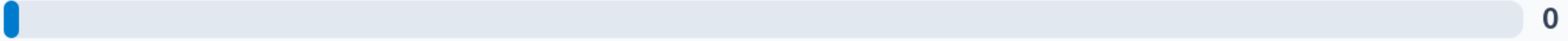
Collect, organize, and share project files



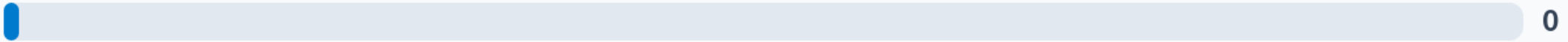
Automatically retrieve full-text PDFs



Automate insertion and formatting of citations



Build a personal database of research interests



# From APA to AMA in a snap!

The references for my paper for which I am providing so much evidence no one will be able to deny the results! Too bad the journal publishing my awesome paper wants me to change the citation style...

McNamee, Laura M., Michael Jay Walsh, and Fred D. Ledley. 2017. "Timelines of Translational Science: From Technology Initiation to FDA Approval." *PLOS ONE* 12(5): e0177371.

Olfson, Mark, Melanie M. Wall, and Carlos Blanco. 2017. "Incentivizing Data Sharing and Collaboration in Medical Research-The S-Index." *JAMA psychiatry* 74(1): 5–6.

Searles, Andrew et al. 2016. "An Approach to Measuring and Encouraging Research Translation and Research Impact." *Health Research Policy and Systems* 14(1): 60.

1. Searles A, Doran C, Attia J, et al. An approach to measuring and encouraging research translation and research impact. *Health Res Policy Syst.* 2016;14(1):60. doi:[10.1186/s12961-016-0131-2](https://doi.org/10.1186/s12961-016-0131-2)
2. Olfson M, Wall MM, Blanco C. Incentivizing Data Sharing and Collaboration in Medical Research-The S-Index. *JAMA Psychiatry.* 2017;74(1):5-6. doi:[10.1001/jamapsychiatry.2016.2610](https://doi.org/10.1001/jamapsychiatry.2016.2610)
3. McNamee LM, Walsh MJ, Ledley FD. Timelines of translational science: From technology initiation to FDA approval. *PLOS ONE.* 2017;12(5):e0177371. doi:[10.1371/journal.pone.0177371](https://doi.org/10.1371/journal.pone.0177371)



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# Selecting a Reference Manager

# Which of these are effective reference managers?

0

0

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0

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A box of index cards

EndNote

Google Docs

Mendeley




Microsoft Word

Zotero

The bookmarks in your web browser

# The Big Three

Endnote, Mendeley and Zotero

Software	Cost to Access	Online PDF Storage	Open Source	Browser Integration	Word Processors	Mobile Apps
	Provided by OHSU Library	Unlimited	No	Web bookmarklet EndNote Click	MS Word Pages Google Docs (new!)	iOS only
	Free	2GB Free	No	Web importer	MS Word Word Online Open Office Libre Office	iOS Android
	Free	200MB Free	Yes	Browser extension	MS Word Open Office Libre Office Google Docs	iOS Third-party



Which reference manager should you choose?



Free or paid?



Open source or proprietary?



Operating system support?



Integration with word processors and web browsers?



What are your friends, collaborators, and PI using?



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The Free Encyclopedia

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# Comparison of reference management software

From Wikipedia, the free encyclopedia

The following tables compare [reference management software](#). Readers using the table to choose reference management software should note the product's "latest stable release date". An older release date suggests that the product is not currently supported and users may encounter technical issues and receive little to no technical support.

## Contents [\[hide\]](#)

- [General](#)
- [Operating system support](#)
- [Export file formats](#)
- [Import file formats](#)
- [Citation styles](#)
- [Reference list file formats](#)
- [Word processor integration](#)
- [Database connectivity](#)
- [Password "protection" and network versions](#)
- [References](#)
- [Bibliography](#)

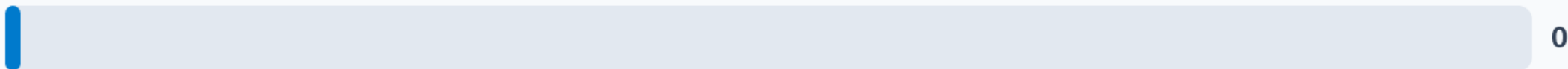
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# Getting a Reference Manager & Getting Stuff Into It

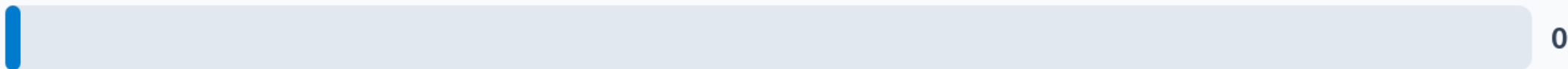
Live Demo!

## Which reference manager would you like to see a demo of?

EndNote



Zotero



## Getting a reference manager

### EndNote

- <https://libguides.ohsu.edu/endnote>

### Zotero

- <https://www.zotero.org/download>

# Getting stuff into a reference manager

## Database Exports

- Importing citations from database exports

## Manual Entry

- Entering references by hand

## Web Browser Bookmarklets or Extensions

- Capture online references

## Finding Full Text

- Locate full text from the Library and the Web

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# Finding Full Text When Your Reference Manager Can't

Get it For Me and Open Access

# Off-Campus Access

Start at the Library's website



<https://libguides.ohsu.edu/remoteaccess> has lots of helpful info and a browser bookmarklet you can use when you forget to start at the Library's website



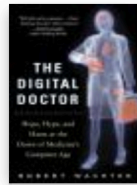
# Getting Full Text from the Library

OHSU Library Get It For Me

- Look for this button in your database results:

**Find @ OHSU**

- What does this button do?
  1. Searches the Library catalog
  2. If we have access, it sends you to the item
  3. If we don't have access....



PRINT BOOK

## The digital doctor : hope, hype, and harm at the dawn of medicine's computer age

[Wachter, Robert M.](#), author.

Publication date: 2015



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Item Details

**Title**

The digital doctor : hope, hype, and harm at the dawn of medicine's computer age

**Author/creator**

[Wachter, Robert M.](#), author. >

**Publisher**

New York : McGraw-Hill Education

**Creation Date**

2015

**Summary**

For the past few decades, technology has been touted as the cure for all of healthcare's ills, yet medicine stubbornly resisted computerization-- until now. Thanks largely to billions of dollars in federal incentives, healthcare has finally gone digital. [Wachter](#) examines healthcare at the dawn of its computer age, and shows how technology is changing care at the bedside. He questions whether government intervention has been useful or destructive-- and does so with clarity, insight, humor, and compassion.

Includes bibliographical references (pages 319-320) and index.

**MESH subjects**

[Medical Informatics](#) >



PRINT BOOK

## The digital doctor : hope, hype, and harm at the dawn of medicine's computer age

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# Managing and Using References

# Organizing Stuff

Organization  
Features

Searching  
and Sorting

Finding  
Duplicates

# Bibliographies and Citations



**ADDING CITATIONS**



**CHANGING STYLES**



# Getting Help

Official support channels are your best option for technical help

- EndNote Support  
<https://support.clarivate.com/Endnote>
- Zotero Documentation and Forums  
<https://www.zotero.org/support/>  
<https://forums.zotero.org/discussions>

OHSU Librarians can help you plan and strategize:

- Guidance on using your reference manager effectively for learning and research

# Workshops!

## EndNote Basics

- In person at RLSB: Thursday, October 26, 2023, 3:00pm
- Online: Wednesday, November 29, 2023, 12:00pm

## Zotero Basics

- In-person at RLSB: Thursday, October 12, 2022 3:00pm
- Online: Wednesday, November 8, 2022 12:00pm

## Register!

- <https://librarycalendar.ohsu.edu/calendar/workshops>

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discovery partner

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[WWW.OHSU.EDU/LIBRARY](http://WWW.OHSU.EDU/LIBRARY)

